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ABSTRACT

Comprehensive rules, guidelines, and examples are provided for use by ERIC indexers and lexicographers in creating and using Identifiers, and in developing and maintaining the ERIC Identifier file via the "Identifier Authority List (IAL)." Identifiers and the IAL are defined/described: Identifiers are highly specific entities, including most proper nouns/noun phrases, for which Thesaurus control is unnecessary--they may also be new concepts, under consideration, or awaiting approval, for admission to the ERIC Thesaurus; the IAL lists all current Identifiers and serves as a companion volume or supplement to the Thesaurus. An initial discussion presents general guidelines/rules applying to all Identifiers (e.g., capitalization, punctuation, length, word form). This is followed by detailed instructions relating to each of twenty specific Identifier categories: Conferences/Meetings; Curriculum Areas; Equipment; Facilities; Geographic Locations; Groups (Ethnic); Groups (Occupations); Groups (Other); Health-Related; Historical/Special Events; Languages/Linguistics; Laws/Legislation; Methods/Theories; Miscellaneous; Organizations/Institutions; Personal Names; Projects/Programs; Science and Technology; Tests/Testing; Titles (Literature and the Arts). (JH)

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ERIC®

PROCESSING MANUAL

Rules and Guidelines for the Acquisition, Selection, and Technical Processing of Documents and Journal Articles by the Various Components of the ERIC Network

SECTION 8: VOCABULARY DEVELOPMENT AND MAINTENANCE (PART 2) — IDENTIFIERS

April 1981

U.S. DEPARTMENT OF EDUCATION
NATIONAL INSTITUTE OF EDUCATION

EDUCATIONAL RESOURCES INFORMATION CENTER

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IR 050073

SECTION VIII:
VOCABULARY DEVELOPMENT AND MAINTENANCE
(PART 2)——IDENTIFIERS

VOCABULARY DEVELOPMENT AND MAINTENANCE (PART 2)——IDENTIFIERS

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VOCABULARY DEVELOPMENT AND MAINTENANCE (PART 2)—IDENTIFIERS

SUMMARY OF SIGNIFICANT RULES

1. Identifiers are semi-controlled retrieval terms intended to add a depth to indexing that is not always possible with Descriptors alone. An Identifier is usually the name of a specific entity, e.g., project, person, place, organization, test, group, item of equipment, piece of legislation. An Identifier may also be a new concept, under consideration for Descriptor status and awaiting approval for admission to the ERIC *Thesaurus*.

2. The *Identifier Authority List* (IAL) should be consulted before index terms are added to the Identifier fields of RIE and CIJE. The IAL serves as a companion volume or supplement to the ERIC *Thesaurus*.

3. A term may not be an Identifier if it is an existing Descriptor, a synonym (UF) referenced to a Descriptor, a Dead/Invalid Descriptor, or a variant form of a Descriptor.

4. Because acronyms have a high potential of being homographs, their use alone is to be avoided.

5. Identifiers may not exceed 50 characters in length, including spaces. Terms naturally exceeding 50 characters must be shortened according to prescribed procedures (i.e., by removal of articles, conjunctions, prepositions, etc., or by abbreviating common words). However, the first word of an Identifier may never be abbreviated.

6. Spelling and word form conventions used for Descriptors should also be used for Identifiers. Spelling of proper names should not be changed. American (United States) English standard usage is followed for common nouns.

7. Non-English terms not found in standard unabridged English dictionaries or in specialized subject dictionaries should be translated (unless they are part of a personal or proper name, such as that of an organization, where translation depends on the way the name usually appears in English print).

8. Numbers exceeding one word in length should normally be written as Arabic numerals (except when the spelled out version is the official or formal name). Roman numerals are permitted only when used as the numbers of legislative "titles."

9. Identifiers do not have the complex hierarchical structure of Descriptors, but they may, as needed, have UF's (providing cross-references) or Scope Notes (providing explanatory material).

10. Identifiers that are homographs must be differentiated either by a parenthetical qualifier or by a spelling variation. <u>They cannot be differentiated by spacing or case</u>.

11. Identifiers may not contain ANY punctuation other than left and right parentheses.

12. Identifiers are grouped by specific characteristics or subject matter into twenty (20) categories, i.e., personal names, organizations, geographic locations, etc. In addition to the general rules contained in this summary, each category has its own specific conventions or guidelines that should be followed in creating Identifiers.

VIII. VOCABULARY DEVELOPMENT AND MAINTENANCE (PART 2)—IDENTIFIERS

A. Introduction

1. Identifiers—Definition and Function

Identifiers are semi-controlled retrieval terms, intended to add a depth to indexing that is not always possible with Descriptors alone. An Identifier is usually the name of a specific entity, e.g., project, piece of legislation, person, place, organization, test, group, item of equipment. There is a nearly infinite number of specific entities, and it would not be appropriate to burden a thesaurus with such multiplicity. Also, Identifiers, being so specific, are often transitory or represented in the literature infrequently, further arguing for separate treatment.

An Identifier may also be a new concept, under consideration for Descriptor status once its scope, definition, and "staying power" have been established. Candidate Descriptors, awaiting approval for admission to the *Thesaurus of ERIC Descriptors*, should always be indexed as Identifiers.

Identifiers are neither structured nor formally defined (as Descriptors are); however, they must be somewhat controlled in order to eliminate the proliferation of variant forms of the same concept. Such control is achieved by imposing format standards, particularly for such entities as geographic locations, organization names, and specific ethnic and occupational groups. It is also helpful to group Identifiers into meaningful categories for the purpose of bringing like terms together. Figure VIII-2-1 depicts the current set of Identifier categories, and the number of Identifiers, as well as the percentage of all Identifiers, in each category as of March 1980. Categories are useful in sub-dividing an Identifier file for particular indexing and searching applications. Editors find categories helpful to quickly determine available options among particular types of terms. Lexicographers use them for spotting omissions and commissions that are less apparent in a total Identifier listing such as the *Identifier Authority List*.

2. *Identifier Authority List* (IAL)

The *Identifier Authority List* or IAL is a total alphabetical list of the preferred Identifier forms, developed according to standards, that can be used to achieve consistency in indexing and searching alike. In printed form, it serves as a companion volume or supplement to the ERIC *Thesaurus*. Just as the *Thesaurus* controls Descriptor usage, the IAL provides control over Identifiers to the extent that variant forms of the same concept are eliminated.

First published in 1980, the IAL was the result of an Identifier editorial project that reviewed the Identifiers in the file from the beginning of ERIC in 1966 through April 1976. The project ultimately reduced the number of Identifiers on the

CATEGORY NUMBER	CATEGORY NAME	NUMBER OF IDENTIFIERS IN CATEGORY	PERCENT OF IDENTIFIER AUTHORITY FILE
02	CONFERENCES/MEETINGS	273	1.0
03	CURRICULUM AREAS	336	1.3
04	EQUIPMENT (INCLUDING COMPUTER PROGRAMS)	695	2.8
05	FACILITIES	197	.8
07	GEOGRAPHIC LOCATIONS	1,909	7.6
08	GROUPS (ETHNIC)	275	1.0
09	GROUPS (OCCUPATIONS)	514	2.4
10	GROUPS (OTHER)	67	.26
11	HEALTH-RELATED (INCLUDING PSYCHOLOGY)	779	3.1
12	HISTORICAL/SPECIAL EVENTS	86	.34
13	LANGUAGES/LINGUISTICS	864	3.4
14	LAWS/LEGISLATION	474	1.8
15	METHODS/THEORIES	1,989	7.9
16	MISCELLANEOUS	1,464	5.8
17	ORGANIZATIONS/INSTITUTIONS	6,127	24.4
18	PERSONAL NAMES	2,009	8.0
19	PROJECTS/PROGRAMS	2,025	8.0
20	SCIENCE & TECHNOLOGY	1,296	5.1
21	TESTS/TESTING	2,993	12.0
22	TITLES (LITERATURE AND THE ARTS)	717	2.9
		25,089	100.0%

FIGURE VIII-2-1: ERIC IDENTIFIER CATEGORIES (STATISTICS AS OF MARCH 1980)

file for that period from approximately 46,000 to 25,000. The cumulation of this large number of Identifiers over ERIC's first 10 years occurred as the system evolved from a manual, print-oriented data base to a system accessible via computer in a variety of different ways. As the number of entry points increased and the file expanded, it became necessary to reduce the number of ways single subjects could be accessed.

The approximately 25,000 edited Identifiers, known as "preferred terms," became the basis for the IAL as it now exists. The other 21,000 "non-preferred terms" were either variant Identifier forms transferred to one of the preferred forms, variants (or duplicates) of Descriptors and eventually transferred to the appropriate Descriptor, or unnecessary or ambiguous items that could simply be purged.

Since the creation of the IAL in mid-1980, additional Identifiers are being added to it as a result of the regular monthly input to the data base. Items are purged from the IAL as they are upgraded to Descriptor status and shifted to the ERIC *Thesaurus*.

The printed IAL should be consulted before index terms are added to the Identifier fields of RIE and CIJE. Working copies of the IAL are produced semi-annually for Clearinghouse use.

The computerized IAL is used as a validation file during the editing of all incoming ERIC resumes.

B. General Guidelines/Rules Applying to All Identifiers

1. Terms That May Not Be Identifiers

a. Descriptors

Once terms have been approved as valid Descriptors, they may not be used as Identifiers (even if they were formerly on the IAL). The *Thesaurus* always takes precedence over the IAL.

b. Synonyms (UF's) of Descriptors

Terms in the *Thesaurus* that are cross-referenced to Descriptors may not be Identifiers. The *Thesaurus* leads the user from these terms to a particular valid Descriptor. To make them Identifiers would undercut this cross-reference and would be contrary to a lexicographic decision already made and recorded.

c. Dead/Invalid Descriptors

Terms that once were valid Descriptors but that have been deliberately removed from the *Thesaurus* as usable terms may not be Identifiers. The qualities of these terms that made them undesirable as Descriptors (e.g., ambiguity) also make them undesirable as Identifiers.

d. Variant Forms of Descriptors

Not all variant forms of Descriptors can be inserted into the *Thesaurus* as UF's. Terms that are merely variant ways of expressing a concept already represented by a Descriptor should not be made Identifiers. The appropriate Descriptor should always be substituted in such cases.

Examples are as follows:

DESCRIPTORS	VARIANT TERMINOLOGY FOR WHICH THE DESCRIPTOR CAN STAND (AND WHICH SHOULD NOT BECOME IDENTIFIERS)
Neonates	Newborns Neonatal Behavior Neonatal Characteristics Neonatal Research
Performance Contracts	Performance Contracting Student Learning Contracts Contract Teaching Contract Learning Grade Contracts

2. Acronyms

The use of acronyms as Identifiers is discouraged. By their nature, acronyms are prone to being homographs. In general, acronyms may be used only when they will not be confused with other words or acronyms. Figure VIII-2-2 illustrates the kinds of problems experienced with acronyms. Figure VIII-2-3 displays examples of some acronyms that have been approved for use as Identifiers.

ACRONYMS	DEFINITIONS
ICONS	An acronym for Interagency Conference on Nursing Statistics
Icons	A language term meaning pictorial representation
TACTICS	An acronym for Technical Assistance Consortium to Improve College Service
Tactics	As in tactics for handling labor relations, military situations, etc.
CASE	A computer program
Case	A linguistic term
CASE	An acronym for Council for Administration of Special Education
CASE	An acronym for Council for the Advancement and Support of Education
RIF	An acronym for Reading Is Fundamental
RIF	An acronym (and UF) for Reduction in Force
Rif	A language

FIGURE VIII-2-2: EXAMPLES OF PROBLEMS EXPERIENCED BY USING ACRONYMS AS IDENTIFIERS

Formerly, ERIC practiced double entry of both spelled out version and acronym. This practice should no longer be used. Similarly, Identifiers should not be created in the form of the spelled out version followed by the acronym in parentheses. The spelled out version should be used in lieu of the equivalent aconymn. Should a document processor wish to associate an acronym with its spelled out version, the place to do so is in the abstract/annotation, as in the following example:

ABSTRACT:...Students involved in the project were clients of the Comprehensive Employment and Training Act (CETA) who had participated in the College Level Examination Program (CLEP)...

IDENTIFIERS: Comprehensive Employment and Training Act; College Level Examination Program

AAHPERD	American Alliance for Health, Physical Education, Recreation, and Dance
AFL CIO	American Federation of Labor and Congress of Indus rial Organizations
AUDACIOUS	Automatic Direct Access to Information with the Online UDC (Universal Decimal Classification) System
AUSINET	Australian Information Network
BALLOTS	Bibliographic Automation of Large Libraries Using Time-Sharing
CINTERFOR	Centro Interamericano de Investigacion y Documentation sobre Formacion Profesional (Interamerican Research and Documentation Center on Vocational Training)
CDA	Child Development Associate
DIDACTA	European Media Conference
ERIC	Educational Resources Information Center
INSPEC	Information Services for the Physics and Engineering Communities
MEDLARS	Medical Literature Analysis and Retrieval System
OCLC	Ohio College Library Center
PLATO	Programmed Logic for Automated Teaching Operations
SEESAW	Computer Program
SUPERMARC	Data Format Standard
UNESCO	United Nations Educational, Scientific, and Cultural Organization
USSR	Union of Soviet Socialist Republics
VAULT	Veterans Accelerated Urban Learning for Teaching

FIGURE VIII-2-3: EXAMPLES OF ACRONYMS APPROVED AS IDENTIFIERS

When a multiword Identifier exceeds 50 characters, it may be necessary to make use of abbreviations (or sometimes acronyms) to keep within the 50-character limit (see below, "Identifier Length").

3. Identifier Length

Identifiers may not exceed a maximum of 50 characters in length (including blanks). Terms naturally exceeding 50 characters must be shortened: (1) via the removal of conjunctions, articles, or prepositions, or, if that is insufficient, (2) via the abbreviation of common words (see Figure VIII-2-4).

The first word of an Identifier should not be abbreviated (except in the case of certain approved organization acronyms, e.g., "ERIC"). The common words may, of course, be abbreviated anywhere else they appear; however, in general, when an Identifier requires abbreviation it is better to abbreviate toward the end of the term rather than toward the beginning. Also, in general, the words in an Identifier that are of greatest significance for searching and retrieval should not be abbreviated. Two examples follow:

Original Term (62 characters)	American Association of Educational Administrators of Guidance
Abbreviated Identifier (49 characters)	American Assn Educational Administrators Guidance

"Association" is the best word to abbreviate. It is not the first word. It is in the table of common words. It is not one of the key words for retrieval (i.e., "Educational Administrators," "Guidance").

Original Term (69 characters)	Federation of Associations in the United States of America and Canada
Abbreviated Identifier (48 characters)	Federation of Associations in the USA and Canada *(Better than the following alternative)* Federation Associations United States Canada

Academy, Academic	Acad
Administration, Administrators, Administrative	Admin
Affiliated, Affiliation	Affil
Agriculcure, Agricultural	Agric
American	Amer
Association(s)	Assn
Associate(s)	Assoc
Audiovisual	AV
Behavioral, Behavior	Behav
Biological, Biology	Biol
Biomedical, Biomedicine	Biomed
Board(s)	Bd
Bureau(s)	Bur
Business	Bus
Center(s), Centre(s)	Ctr
Chemistry	Chem
College(s)	Coll
Committee, Community	Comm
Communication(s)	Commun
Conference(s)	Conf
Convention(s)	Conv
Continuing	Cont
Cooperative, Cooperation	Coop
Coordination, Coordinator	Coor
Corporation(s)	Corp
Curriculum	Curr
Department(s), Departmental	Dept
Development, Developmental	Develop
District(s)	Dist
Division(s)	Div
Education, Educational	Educ
Evaluation	Eval
Faculty, Faculties	Fac
Facility, Facilities	Facil
Federal	Fed
Government	Govt
Guidance	Guid
Hospital(s)	Hosp
Industrial, Industry	Indust
Information	Info
Institute(s), Institution(s)	Inst
Instruction, Instructional	Instr
Interdisciplinary	Interdiscip
International	Intl
Laboratory	Lab
Language(s)	Lang
Library	Lib
Literature	Lit
Mathematics	Math
Metropolitan	Metro
National	Natl
Occupational, Occupations	Occup
Program(s)	Prog
Project(s)	Proj
Psychology, Psychological	Psych
Research	Res
Research and Development	R and D
School(s)	Sch
Science(s)	Sci
Service(s)	Serv
Session(s)	Sess
Special	Spec
Superintendent(s)	Supt
Teaching, Teacher(s)	Teach
Technical	Tech
Technological, Technology	Techn
Television	TV
University	Univ

FIGURE VIII-2-4: COMMON WORDS THAT MAY BE ABBREVIATED IN IDENTIFIERS WHEN TRUNCATING TO MAKE 50-CHARACTER LIMIT

"Federation" and "Associations" are the key words for retrieval and should not be abbreviated. The first alternative does the least overall violence to the original name.

4. Numbers

Numbers exceeding one word in length, whether they are a part of or the whole of the concept being indexed, should normally be written as Arabic numerals and not spelled out, unless the spelled out version is the official or formal version.

Examples of Identifiers containing Arabic numbers are:

1984 (Title)	NOTE: The qualifier "(Title)" is placed after the names of literary/ artistic works that might otherwise not be recognized as such.
1 8 1 8 Plan	
4 1 4 Calendar	
45 15 Plan	
4 H Clubs	
Congress 95th	
Copyright Law 1976	

Examples of Identifiers using the spelled out version are:

Fourteenth Amendment	Three Little Pigs
Nineteenth Century	Twentieth Century
One Act Plays	Two Stage Testing
One Nation Indivisible	Two Way Communication
One Word Sentence Completion	

Roman numerals are permitted only when used as the numbers of "Titles" (i.e., sections) in legislation.

Elementary Secondary Education Act Title III
Social Security Act Title XX

The official or formal version of a numerical concept is always chosen when it can be determined, even if it should vary from the above conventions.

Calendar dates (years, months, days) should always be expressed as numerals, except in those special instances where a date (spelled out) is the title of a literary/artistic work, e.g., "Twelfth of June (Title)."

5. Spelling and Word Form

In general, the same spelling and word form conventions used for Descriptors should also be used for Identifiers. This allows concept-type Identifiers, when appropriate, to "graduate" to Descriptor status with a minimum of alteration. It is also beneficial to searchers if they can rely on ERIC to be consistent in the construction of its index terms.

The spelling of proper names should not be changed from that of the official or formal version, e.g.:

- Centre for Continuing Education (Australia)
  (Do not change "Centre" to "Center.")
- Organisation for Economic Cooperation [and]* Development
  (Do not change "Organisation" to "Organization.")
- Computer Programmer Aptitude Battery
  (Do not change "Programmer" to "Programer.")

However, American (i.e., United States) English standard usage is followed when common nouns or generics are involved, e.g.:

- Programed Student Achievement
- Testing Centers
- Student Health Organizations

The *Thesaurus*' Rotated Display is an excellent source to consult in determining the proper spelling and/or format for similar words, e.g.:

*"and" deleted to fit name within 50-character limit

PREFERRED WORD FORM	NON-PREFERRED WORD FORM	GUIDANCE FROM *THESAURUS'* ROTATED DISPLAY
• Parent Behavior Parent Rights	Parental Behavior Parental Rights	Parent Associations Parental Background USE Parent Background
• Theological Libraries	Libraries (Theological)	Public Libraries Regional Libraries School Libraries (i.e., No Inverted Entries)
• Programed Student Achievement	Programmed Student Achievement	Programed Instruction Programed Tutoring (i.e., No Double M's)
• Retroaction (Psychology)	Retroaction (Psychological)	Recall (Psychological) USE Recall (Psychology)

6. Non-English Terms

The English language has incorporated much terminology from other languages for which there is no exact or simple translation into English, e.g., Machismo, Deja Vu, Roman a Clef. Such terms can regularly be found in English language dictionaries and can therefore be considered part of the normal resources of the language. They need not be translated when used as Identifiers.

In addition, a great deal of Latin terminology can be considered a normal part of English usage, particularly as employed in the fields of law and medicine, e.g., Corpus Delicti, Spina Bifida. Such terms likewise need not be translated.

The propensity of English to "borrow" in this way makes it difficult to formulate a single general rule that applies to all non-English terminology.

If a non-English term or phrase can be found in standard unabridged English dictionaries, or in the specialized dictionaries of fields such as law and medicine, then the term may be used as is, without translation. If a term cannot be identified in such sources, then an attempt should be made to translate it into English. Translation should be based closely on the original and should not be excessively creative or "free."

The objective is to translate in a repeatable way so that if another indexer at another time is faced with the same term the same translation will result. (Translators should keep in mind that the ERIC data base does not provide for diacritical marks of any kind.)

The use of foreign proper names as Identifiers depends on the way they normally appear in English print. In general, personal names are recorded as close to their appearance in their original language as possible. A good reference to use for personal name form problems is the *Anglo-American Cataloging Rules*. Organizational names present a more complex problem. Names from languages with non-Roman alphabets (e.g., Cyrillic) are always translated (not just transliterated) into their English equivalent. Names from other languages should follow the practice of the standard international reference work in the field of institutions of education, *The World of Learning*.

Examples of some non-English terms and how they would be handled as Identifiers are displayed in Figure VIII-2-5.

Two general references of value are:

(1) Section 25: "Foreign Languages" of the *GPO Style Manual*, and

(2) Section 9: "Foreign Languages in Type" of the Chicago *Manual of Style*.

Both contain detailed material on typography, diacritics, capitalization, punctuation, special characters, abbreviation, word division, etc., of all the common foreign languages.

7. Structure (i.e., Cross-References, Scope Notes)

Identifiers do not have the complex cross-reference structure accorded Descriptors, i.e., NT's, BT's, RT's. However, beginning in 1981 two elements of structure were added to the *Identifier Authority List* (IAL): (1) Used For cross-references, and (2) Scope Notes. Either or both of these elements may now be added on an "as needed" basis to any given Identifier.

a. "Used For" Cross-References

Used For cross-references should be used either to indicate preferred name forms or to lead from an abbreviation/acronym to the correct full form, e.g.:

Empire State College
USE State University of New York Empire State Coll

CETA
USE Comprehensive Employment and Training Act

TERM	NOTE
Avant Garde	"Borrowed" French term.
Blitzkrieg	"Borrowed" German term.
*Carrascolendas (Television Series)	Television Series.
*De Bello Civili	Classical Latin text.
*Diaz del Castillo (Bernal)	Person.
*Dia de los Muertos	Hispanic holiday.
*Globus Hystericus	Medical term (Latin).
*Habeas Corpus	Legal term (Latin).
*In Loco Parentis	Legal term (Latin).
Laissez Faire	"Borrowed" French term.
*La Raza Unida Party	Political party. Name commonly used untranslated in both Hispanic and English contexts.
*Machismo	"Borrowed" Spanish term.
*Moscow State University (USSR)	Foreign organization. Translated from Russian (Cyrillic).
Realites	French Magazine.
*Spina Bifida	Medical term (Latin).
Tae Kwon Do	Martial Art. Transliterated from Japanese.
*Universidad de Educacion a Distancia (Spain)	Foreign organization. Name form retained as is. Country added in parentheses.
*War and Peace	Name of novel. Translated from Russian.
Weltschmerz	German term meaning literally "world weariness" but borrowed by English.

* Existing Identifier

FIGURE VIII-2-5: EXAMPLES OF NON-ENGLISH TERMS AND HOW THEY WOULD BE HANDLED AS IDENTIFIERS

Cross-references will not normally be made from nonpreferred direct forms (e.g., San Juan Puerto Rico) to preferred inverted forms (e.g., Puerto Rico (San Juan)).

Used For references are limited in length to 50 characters (including blanks).

b. Scope Notes

The Scope Note field provides a home for a wide variety of explanatory material bearing on indexing distinctions and clarifications, e.g.,

Ilocano
SN Indonesian Language

AAHPERD
SN Acronym for the American Alliance for Health, Physical Education, Recreation, and Dance

Russia
SN Before 1917 an East European country, and after that a republic of the USSR——Use "USSR (Russia)" for documents dealing solely with that republic——do not confuse with "USSR"

In general, Identifier Scope Notes should not be used simply to define a term, as is done in the *Thesaurus*. It is not ERIC's intention to provide definitions for the many thousands of relatively obscure Identifiers.

8. Capitalization

Identifiers are written with initial capital letters for all words except prepositions, articles, and conjunctions. Exceptions occur in those infrequent cases where the preposition/article/conjunction is the first word of the Identifier, or where it is used in a literary/artistic title.

NORMAL USAGE:	Department of Education
LEADING PREPOSITION:	Off Campus Activities
TITLE:	Graduate (The)

Further examples of usual and exceptional upper/lower case situations for both Descriptors and Identifiers can be found in Figure VIII-2-6. (This figure also appears in Section 7: "Indexing" in the discussion entitled "Capitalization of Index Terms.")

9. Word Order

Each Identifier category specifies its own word order conventions. If no guidelines or examples can be found pertinent to a proposed new Identifier, natural word order should be followed.

	DESCRIPTORS		IDENTIFIERS	
ARTICLES/ CONJUNCTIONS/ PREPOSITIONS	**USUAL USAGE (LC) (EXAMPLE)**	**EXCEPTION (UC) (EXAMPLE)**	**USUAL USAGE (LC) (EXAMPLE)**	**EXCEPTION (UC) (EXAMPLE)**
A	Postsecondary Education as a Field of Study	None	To Kill a Mockingbird	A Better Chance Inc
AN	None	None	To an Athlete Dying Young	---
AND	Food and Drug Inspectors	None	Crime and Punishment	And Searching Mind*
AS	Postsecondary Education as a Field of Study	None	Maryland Self Concept as a Learner Scale	As You Like It
BY	Management by Objectives	None	Baghdad by the Bay*	By Love Possessed*
FOR	English for Special Purposes	None	Fund for Adult Education	For Whom the Bell Tolls*
IN	Reduction in Force	In State Students	Catcher in the Rye	In Cold Blood
OF	Leaves of Absence	None	Epic of Gilgamesh	Of This Time of That Place
ON	State Committees on Education (UF)	On Campus Students On the Job Training	Soul on Ice	On the Origin of Species
PER	Expenditure per Student	None	---	Per Capita*
THE	State of the Art Reviews	None	College of the Sea (England)	Graduate (The)
TO	Adjustment (to Environment)	None	Pathways to Identity Project	To Kill a Mockingbird

LC = Lower case; UC = Upper case

*Not currently an Identifier

FIGURE VIII-2-6: CAPITALIZATION OF ARTICLES/CONJUNCTIONS/PREPOSITIONS IN DESCRIPTORS AND IDENTIFIERS

10. Punctuation

With the exception of parentheses, no punctuation may be used in Identifiers. (This restriction refers solely to punctuation within the Identifier itself and does not refer to the semicolon used as a subfield delimiter between multiple Identifiers, or to the asterisk used to tag major Identifiers).

Terms normally having punctuation, e.g., commas, hyphens, apostrophes, ampersands, periods, exclamation marks, quotation marks, colons, slashes, question marks, etc., must be corrected to acceptable forms without punctuation. Examples of such conversions are shown below:

POTENTIAL TERM WITH PUNCTUATION	FINAL ACCEPTABLE IDENTIFIER WITHOUT PUNCTUATION
James E. Allen, Jr.	Allen (James E Jr)
T.S. Eliot	Eliot (T S)
Eugene O'Neill	O Neill (Eugene)
Bloom's Taxonomy	Blooms Taxonomy
45-15 Plan	45 15 Plan
St. Paul Public Schools MN	Saint Paul Public Schools MN
Dick & Jane Readers	Dick and Jane Readers
If You Live in a City, Where Do You Live?	If You Live in a City Where Do You Live
They Shoot Horses, Don't They?	They Shoot Horses Dont They
Oh, God!	Oh God (Title)
"I Heard a Fly Buzz When I Died"	I Heard a Fly Buzz When I Died
Yorkshireman: A Case Study	Yorkshireman A Case Study
Field Dependence/Independence	Field Dependence Independence

11. Homographs

Homographs (terms with different meanings that have the same spelling) must be differentiated by creating some difference in the spelling or by adding a parenthetical qualifier, e.g.:

TERM	MEANING	DIFFERENTIATED TERMS
PLATO	Computer-assisted education system	PLATO
Plato	Greek philosopher	Plato of Athens
Jupiter	Roman god	Jupiter
Jupiter	Planet	Jupiter (Planet)
Jupiter	Ballistic missile	Jupiter Missile

Homographs cannot be differentiated by creating differences in capitalization and spacing. The ERIC computer system, in comparing index terms during the automatic validation process, converts all terms to upper case and removes blanks and special characters (except the left parenthesis). This procedure means that terms varying only in capitalization and/or the appearance of blank spaces are interpreted by the computer as the same term.

TERMS VARYING ONLY IN CAPITALIZATION OR BLANK SPACES	AS TRANSLATED BY COMPUTER FOR COMPARISON PURPOSES
Project Out Reach	PROJECTOUTREACH
Project OUTREACH	"
Project Outreach	"

If the above variant forms were actually used by ERIC indexers and were appearing together in an index, all the variants would validate, but the printed/displayed index entry would be determined by the particular variant that appeared first in the sequence of accessions involved, i.e., that was read first by the computer.

It is clearly undesirable for terms varying only by capitalization and spacing to be placed in the ERIC file. In addition to creating potentially confusing index entries, such terms can adversely affect retrieval efforts. For example, to retrieve all the accessions using the three "Projectoutreach" variant forms cited above, a searcher would have to use two distinct search strategies:

Outreach/ID
Out (w) Reach/ID

12. Special Indexing Agreements and Recommendations

From time to time ERIC makes formal arrangements with specific organizations or programs to index the document output of that organization in a special way in order to facilitate retrieval. Usually these are organizations and projects funded by some element of the Department of Education, e.g., National Diffusion Network (NDN); National Assessment of Educational Progress (NAEP).

In addition, ERIC sometimes independently makes recommendations to the Clearinghouses concerning the indexing of certain classes of documents, e.g., Information Analysis Products.

All current agreements and recommendations made to date are summarized in Figure VIII-2-7. (This figure also appears in Section 5: "Cataloging" in the discussion of the Identifier field.)

ORGANIZATION NAME OR TYPE OF DOCUMENT	AGREEMENT OR RECOMMENDATION
Information Analysis Products (IAP's)	• All ERIC Clearinghouse Information Analysis Products were formerly indexed by the major Identifier "Information Analysis Products." With the advent of the Publication Type data element (and specifically code 071 for IAP's), this indexing convention became obsolete and should no longer be observed.
National Assessment of Educational Progress (NAEP)	• The NAEP is currently operated by the Education Commission of the States (ECS). All NAEP documents should be indexed: (1) by "National Assessment of Educational Progress," and (2) by one or more of the special Identifiers listed in Figure VIII-2-8.
National Diffusion Network (NDN)	• Documents about NDN should be indexed by the (preferably major) Identifier "National Diffusion Network." • Documents generated by programs or projects under NDN sponsorship should be indexed by the minor Identifier "National Diffusion Network Programs." • NDN projects with specific names should be indexed by these names as (preferably major) Identifiers, e.g., "Project Adventure." • Documents describing JDRP*-validated programs should be indexed by the minor Descriptor "Validated Programs." (Documents dealing with the actual subject matter of validation should be indexed with the Descriptor "Program Validation.")
Research and Development Utilization (RDU) Program	• Documents resulting from the RDU program should be indexed by the major Identifier "Research and Development Utilization Program." • Use of the Descriptor "Linking Agents" to index RDU materials is recommended as often appropriate. • The Sponsor for all RDU materials should be cited as the National Institute of Education (with whatever subdivision and Departmental label is appropriate at the time).

*JDRP - Joint Dissemination Review Panel

FIGURE VIII-2-7: SPECIAL INDEXING ARRANGEMENTS

SPECIFIC NAEP ASSESSMENTS

REGULAR ASSESSMENTS

First Art Assessment (1975)
Second Art Assessment (1979)

First Career Occup Develop Assess (1974)
Second Career Occup Develop Assess

First Citizenship Assessment (1970)
Second Citizenship Social Studies Assess (1976)
Third Citizenship Social Studies Assess (1982)

First Literature Assessment (1971)

First Mathematics Assessment (1973)
Second Mathematics Assessment (1978)
Third Mathematics Assessment (1982)

First Music Assessment (1972)
Second Music Assessment (1979)

First Reading Assessment (1971)
Second Reading Assessment (1975)
Second Literature Third Reading Assessment (1980)

First Science Assessment (1970)
Second Science Assessment (1973)
Third Science Assessment (1977)

First Social Studies Assessment (1972)

First Writing Assessment (1970)
Second Writing Assessment (1974)
Third Writing Assessment (1979)

MINI ASSESSMENTS

Adult Reading Mini Assessment (1977)
Adult Science Mini Assessment (1977)
Basic Life Skills Mini Assessment (1977)
Career Occup Develop Mini Assessment (1980)
Consumer Skills Mini Assessment (1978)
Energy Knowledge Attitudes Mini Assessment (1977)
Functional Literacy Mini Assessment (1975)
Health Awareness Mini Assessment (1977)
Mathematics Mini Assessment (1976)

FIGURE VIII-2-8: SPECIAL IDENTIFIERS TO BE ASSIGNED TO NAEP DOCUMENTS INPUT TO ERIC SYSTEM (ASSIGNMENT TO BE INDICATED BY NAEP ON ORIGINAL DOCUMENTS)

C. Guidelines Applying to Identifiers in Specific Categories

Every Identifier is assigned to one (and only one) of the twenty broad categories listed in Figure VIII-2-1. The category number is assigned to the Identifier at the time it is entered into the *Identifier Authority List* (IAL). Identifier categories serve the same purpose for Identifiers that Descriptor groups do for Descriptors, i.e., browsing and easy scanning of large numbers of terms that may be of interest within a given area.

Individual listings of Identifiers by category are published periodically, as needed. Certain original categories (01 for "Acronyms" and 06 for "Foreign Words and Phrases") have been discontinued; therefore, the only active category numbers are 02-05, 07-22.

While the general rules discussed previously apply to all Identifiers, the guidelines that follow are grouped by category and apply only to terms in that specific category.

1. Conferences/Meetings (Category 02)

This category brings together the formal names of gatherings held either regularly or on a one-time basis. It is not to be confused with organizational names containing the word "Institute" or "Conference."

Identifiers for conference/meeting names are appropriate only when the meeting is the subject of the document. They are not appropriate as simply a way to tag all of the papers or proceedings from a particular meeting. The Descriptive Note field is the proper field to identify the meeting at which a paper was given. A meeting may be the subject of a document when, for example, the document is analyzing the results of a meeting, the need for a meeting, the ramifications of resolutions passed, the impact of a meeting, or the design of a meeting.

Natural word order is followed, without artificial inversions, e.g.:

Brookings Conference on Vocational Education
National Computer Conference
White House Conference on Aging

Since conference names are often long and may exceed the 50-character limit, abbreviation is frequently required. Using an acronym for the organization involved is an acceptable technique, e.g.:

Conference: National Council of Teachers of English Seminar on Research in English Education (80 characters)

Use: NCTE Seminar on Research in English Education (45 characters)

Conferences which occur regularly under the same name, with only the date differing, should be entered under the standard name without date. Material for specific years can be retrieved by coordinating Identifier with Publication Date.

Since the geographic location of a conference is usually incidental and inconsequential, conference name Identifiers should almost never use forms such as "New York Conference," "Conference at Idaho Falls," etc.

Names should always be as complete as possible, especially as to the topic of the gathering, e.g.:

Use: Rutgers Conference on School Lunch Programs
Do Not Use: Rutgers Conference

2. Curriculum Areas (Category 03)

This category contains names of courses, listings in catalogs, teaching sequences, specific curricula, and other curriculum-related terms, e.g.:

Biological Sciences Curriculum Study
Business Law
Chicano Studies
Man A Course of Study

Curriculum series are frequently the end result of a project or program and may be referred to by the project/program name as well as by the curriculum name. In such situations, one name should be selected as the preferred form, e.g.:

Preferred Identifier: Bereiter Engelmann Curriculum

Non-Preferred Synonyms: Bereiter Engelmann Method
Bereiter Engelmann Preschool Program
Bereiter Engelmann Program
Bereiter Engelmann Language Training Program

3. Equipment (Category 04)

This category contains the names of specific hardware, computer software, programing languages, materials, classroom aids/tools, etc. Examples are:

Abacuses
Asbestos
BASIC Programing Language
Binoculars
Honeywell Computers
Lockers
PLATO II
Wang 700 Programming Calculator

Kinds of equipment should be entered in the plural form, e.g., "Thermostats."

Specific items of equipment should be entered in the singular form; however, very specific model numbers should be avoided in favor of broader model designators, e.g.:

Preferred: IBM System 360 370

Non-Preferred: IBM System 360 Model 40
IBM System 360 Model 65

Programing languages should not be entered under the acronym alone, but should have the phrase "Programing Language" appended, e.g.:

BASIC Programing Language
LISP Programing Language
PL 1 Programing Language

4. Facilities (Category 05)

This category includes types of physical facilities or organizations. It excludes the names of specific organizations. Examples are:

Boards of Cooperative Educational Services
Chambers of Commerce
Infant Schools (United Kingdom)
Montessori Schools
Primary Schools (United Kingdom)
Stadiums
Textile Industry

All facilities names should be constructed in the plural form (as above). Concepts from a non-U.S. context which might be misconstrued should have an appropriate qualifier added, e.g.:

Infant Schools (United Kingdom)

5. Geographic Locations (Category 07)

This category contains the names of continents, countries, provinces, states, territories, regions, counties, cities, parks, and all types of physical formations (e.g., rivers, mountains, deserts, valleys, deltas, islands, peninsulas, etc.). Examples are contained in Figure VIII-2-9.

a. Format

Names of the fifty (50) U.S. states and the twelve (12) Canadian provinces/territories are entered directly. Names of communities, cities, and counties in the U.S. and Canada are not entered directly; instead, these smaller political subdivisions are entered as parenthetical qualifiers to the name of the particular state or province in which each resides.

Africa (East)
Alabama
Alberta (Calgary)
Antarctica
Appalachia
Asia (Southeast)
Atlantis
Australia (Melbourne)
British Commonwealth
California (Los Angeles)
District of Columbia
Easter Island
England (London)
Europe
Everglades
Florida (Hollywood)
Ganges River
Germany
Gondwanaland
Great Plains
Greenland
Guam (Agana)
Hong Kong
Italy (Sicily)
Lake Michigan
Maryland (Montgomery County)
Massachusetts (Cambridge)
Massachusetts (Springfield)
Mississippi Delta
Missouri (Saint Louis)
Mount Whitney
New York (Harlem)
New York (Manhattan)
New York (New York)
New York (Niagara Falls)
Niagara Falls
Nile River
Ontario (Ottawa)
Pacific Ocean
Pacific Trust Territory (Marshall Islands)
Quebec (Quebec)
Sahara Desert
Scandinavia
Siberia
South America
South Korea (Seoul)
Sweden (Stockholm)
Texas (Paris)
Timor
United States (South)
USSR (Tadzhikistan)
Wales
Washington (Seattle)
West Germany
Wisconsin (Eau Claire County)
Yakima Valley
Yosemite National Park

FIGURE VIII-2-9: EXAMPLES OF HOW GEOGRAPHIC LOCATIONS ARE ENTERED

All Identifiers for countries other than the U.S. and Canada are entered with the name of a country followed by geographic subdivisions in parentheses, as appropriate. These procedures are followed in order to provide easy access to both generic and specific geographic levels (e.g., all Alabama localities will appear under the state name "Alabama," as for example "Alabama (Jefferson County)," "Alabama (Mobile)," etc.).

For purposes of this guideline, the "District of Columbia" and the U.S. Territories (i.e., "American Samoa," "Canal Zone," "Guam," "Pacific Trust Territory," "Puerto Rico," and "Virgin Islands") are considered on the same level as states. Also, divisions of the United Kingdom (i.e., "England," "Northern Ireland," "Scotland," and "Wales") are considered on the same level as countries. "Preferred" country names are included in the relatively complete list that immediately follows this discussion.

The names "United States," "Canada," and "United Kingdom" are normally used without qualifiers. However, these and all other place names may be qualified by common directional notations (e.g., "west," "southeast," "north central," "midwest"), which would be ambiguous if left standing alone. Typical entries of this type would be: "Canada (Northwest)," "Europe (East)," "Mexico (North Central)." Official names such as "North Carolina" and "Northwest Territories," and meaningful concepts such as "Middle East," are, of course, not considered directional notations.

Excluding the country Australia, continents may only be subdivided by directional notations or by large nonpolitical areas, e.g., "Africa (Sub Sahara)," "Africa (Tropical)," "Asia (Central)," "Asia (West)," "Europe (East Central)."

Names of overseas territories and natural geographic features and regions are entered directly and not as qualifiers to a larger entity, e.g.,

PREFERRED FORM	DO NOT USE
Easter Island	Chile (Easter Island)
Everglades	Florida (Everglades)
Siberia	USSR (Siberia)

Existence of a geographic location and its proper spelling should be verified in standard unabridged geographic dictionaries or gazetteers, e.g., *Webster's New Geographical Dictionary, Lippincott's Gazetteer.*

b. Subject versus Geographic Source

Do not confuse subject matter with geographic source. Geographic Identifiers are intended to reflect the subject matter of a document, i.e., the area studied, the area from which the data were gathered, etc., and are not intended to reflect the location of an institution doing the work, the location of an institution to which an author is affiliated, or the location of a publisher.

RIE carries a separate field to specifically identify the "Geographic Source" of a document. Although CIJE records do not carry this same field, the use of Identifiers to indicate geographic source should be strictly avoided as such a practice is misleading and detrimental to subject retrieval.

c. Homographs

Care should be taken in interpreting geographic locations cited in the text of documents. For example, twenty-four (24) states have a "Jefferson County"; eighteen (18) states have a "Springfield" town/city/village. Make certain that the name being used is correctly identified as to state, province, etc., and that it is not confused with a similar name from another location.

d. Indexing Practices

Be precise and specific in assigning geographic Identifiers. For example, do not use "Great Britain" unless the subject is truly the United Kingdom excluding Northern Ireland. "Russia" should be used only for the country name prior to 1917 and should not be confused with the current name "USSR." The current Soviet republic of Russia should be indexed "USSR (Russia)."

Do not confuse institutions and geographic Identifiers. For example, if the subject of a document is the policies of the Chicago Public Schools, assign the organizational Identifier "Chicago Public Schools IL" and not the geographic Identifier "Illinois (Chicago)." If the document perhaps also includes the subject of the impact of these policies on the citizens of Chicago, then the Identifier "Illinois (Chicago)" would also be appropriate.

Do not automatically "index up" to the broad levels "United States," "Canada," and "United Kingdom." A document should be indexed by more than one level of geographic Identifier only if it genuinely deals with dual or multiple levels.

e. Preferred Country Names

The three lists that follow display:

(1) the provinces and territories of Canada;
(2) the divisions ("countries") of the United Kingdom;
(3) preferred name forms for most of the world's existing countries.

The third list contains a small number of cross references. "Use" references have been made from some common but nevertheless non-preferred forms to the preferred forms, e.g., "Britain, Use Great Britain." The reciprocal of a Use reference is a "Used For" (UF) reference. "See" references have been made from older name forms to current name forms. These older names, which are sometimes appropriate for the indexing of older or historical documents, are preceded by an asterisk (*). The reciprocal of the See reference is a "Seen From" (SF) reference.

List 1: Canadian Provinces and Territories

Alberta
British Columbia
Manitoba
New Brunswick
Newfoundland
Northwest Territories
Nova Scotia
Ontario
Prince Edward Island
Quebec
Saskatchewan
Yukon Territory

List 2: United Kingdom Divisions ("Countries")

England
Northern Ireland
Scotland
Wales

List 3: Preferred Country Names

(* = older name form)

Afghanistan
Albania
Algeria
Andorra
Angola
Argentina
Australia
Austria
Bahamas
Bahrain
Bangladesh
  SF East Pakistan
Barbados
Belau
  SF Palau Islands
Belgium
Belize
  SF British Honduras
Benin
  SF Dahomey
Bermuda
Bhutan
Bolivia
Bophuthatswana
Botswana
Brazil
Britain
  USE Great Britain
*British Guiana
  SEE Guyana
*British Honduras
  SEE Belize
Brunei
Bulgaria
Burma
Burundi

(Continued)

*Cambodia
SEE Kampuchea
Cameroon
Canada
NOTE When appropriate, use province (see List 1, above)
Cape Verde
Central African Republic
*Ceylon
SEE Sri Lanka
Chad
Chile
China
NOTE Do not confuse with Taiwan
UF Mainland China; Peoples Republic of China
Ciskei
Colombia
Comoros
Congo
Costa Rica
Cuba
Cyprus
Czechoslovakia
*Dahomey
SEE Benin
Democratic Yemen
UF Peoples Democratic Republic of Yemen; Yemen (Democratic); Southern Yemen
Denmark
Djibouti
Dominica
Dominican Republic
East Germany
UF German Democratic Republic
*East Pakistan
SEE Bangladesh
Ecuador
Egypt
El Salvador
*Ellice Islands
SEE Tuvalu
Equatorial Guinea
Ethiopia
Federal Republic of Germany
USE West Germany
Fiji
Finland
*Formosa
SEE Taiwan
France
*French Guiana
SEE Guiana
French Polynesia
Gabon
Gambia
German Democratic Republic
USE East Germany
German Federal Republic
USE West Germany
Ghana
*Gilbert Islands
SEE Kiribati
Great Britain
NOTE When appropriate, use England, Scotland, or Wales
UF Britain
Greece
Grenada
Guadeloupe
Guatemala
Guiana
SF French Guiana
Guinea
Guinea Bissau
Guyana
SF British Guiana
Haiti
*Holland
SEE Netherlands
Honduras
Hong Kong
Hungary
Iceland
India
Indonesia
Iran
Iraq
Ireland
Israel
Italy
Ivory Coast
Jamaica
Japan
Jordan
Kampuchea
SF Cambodia; Khmer Republic
Kenya
*Khmer Republic
SEE Kampuchea

(Continued)

Kiribati
SF Gilbert Islands
*Korea
SEE North Korea; South Korea
Kuwait
Laos
Lebanon
Lesotho
Liberia
Libya
Liechtenstein
Luxembourg
*Madagascar
SEE Malagasy Republic
Mainland China
USE China
Malagasy Republic
SF Madagascar
Malawi
Malaysia
Maldives
Mali
Malta
Martinique
Mauritania
Mauritius
Mexico
Monaco
Mongolia
Morocco
Mozambique
Namibia
UF South West Africa
Nationalist China
USE Taiwan
Nauru
Nepal
Netherlands
SF Holland
Netherlands Antilles
New Caledonia
New Hebrides
New Zealand
Nicaragua
Niger
Nigeria
North Korea
SF Korea
*North Vietnam
SEE Vietnam
Norway
Oman
Pakistan
SF West Pakistan
*Palau Islands
SEE Belau
Panama
Papua New Guinea
Paraguay
Peoples Democratic
Republic of Yemen
USE Democratic Yemen
Peoples Republic of China
USE China
Peru
Philippines
Poland
Portugal
Qatar
Reunion
*Rhodesia
SEE Zimbabwe
Rumania
*Russia
SEE USSR
Rwanda
San Marino
Sao Tome e Principe
Saudi Arabia
Senegal
Seychelles
Sierra Leone
Singapore
Solomon Islands
Somalia
South Africa
South Korea
SF Korea
*South Vietnam
SEE Vietnam
South West Africa
USE Namibia
Southern Yemen
USE Democratic Yemen
Spain
*Spanish Sahara
SEE Western Sahara
Sri Lanka
SF Ceylon
Sudan
Surinam
Swaziland
Sweden

(Continued)

Switzerland
Syria
Taiwan
  SF Formosa
  UF Nationalist China
*Tanganyika
  SEE Tanzania
Tanzania
  SF Tanganyika
Thailand
Togo
Tonga
Transkei
Trinidad and Tobago
Tunisia
Turkey
Turks and Caicos Islands
Tuvalu
  SF Ellice Islands
Uganda
United Arab Emirates
United Kingdom
  NOTE When appropriate use "country" (see List 2, above)
United States
  NOTE When appropriate, use state or territory name(s)
Upper Volta
Uruguay
USSR
  SF Russia
Vatican City State
Venda
Venezuela
Vietnam
  SF North Vietnam; South Vietnam
West Germany
  UF Federal Republic of Germany; German Federal Republic
*West Pakistan
  SEE Pakistan
Western Sahara
  SF Spanish Sahara
Western Samoa
Yemen
  NOTE Yemen Arab Republic
Yemen (Democratic)
  USE Democratic Yemen
Yugoslavia
Zaire
Zambia
Zimbabwe
  SF Rhodesia

6. Groups (Ethnic) (Category 08)

This category contains the names of groups of people related by ethnic, cultural, racial, or national factors.

a. Plural versus Singular

American Indian groups are entered in the singular (see special instructions under item "d" below). All other groups are entered in the plural form. Examples are:

Africans
British
Canadians
English Canadians

b. Group Names versus Language Names

Group names and language names are often homographs. The convention observed by ERIC is to modify the group name to distinguish it from the language name. For example,

Group (from IAL)	Language (from *Thesaurus*)
Apache (Tribe)	Apache
Chinese People	Chinese

c. Identifier Groups versus Descriptor Groups

Some ethnic groups are Descriptors, e.g., Spanish Americans. Indexers must, therefore, check both the *Thesaurus* and the IAL before entering groups in either field.

Some subgroups of an ethnic group must be indexed coordinately using both Identifiers and Descriptors, e.g.,

Indexable Concept	African Children
Index Terms	Identifier: Africans Descriptor: Children

d. American Indians

An American Indian group may be designated as a tribe, band, people, or nation. American Indian groups are not pluralized but are entered in the singular form, e.g., Apache (Tribe) not Apaches. Examples are:

Aleut (Tribe)	Cherokee Nation
Cheyenne (Tribe)	Navajo (Nation)
Chippewa (Tribe)	Pueblo (People)
Cherokee (Tribe)	

All American Indian groups may be further subdivided. In such cases, the specific subgroup should be qualified by the name of the larger group, e.g.,

Laguna (Pueblo)

Certain broad American Indian group names that are neither tribe, band, nor nation, emanate from the discipline of anthropology and can be qualified as such to indicate to non-specialists that the terms are well-defined and authoritative, e.g.,

Plains Indians (Anthropology)

The spelling and format of all American Indian names not originating at the ERIC Clearinghouse on Rural Education and Small Schools must be verified with the appropriate subject specialist at that Clearinghouse, who is aware of the expressed preferences of specific American Indian groups.

For consistency throughout the system, the following indexing conventions should be observed when indexing American Indian groups:

AMERICAN INDIAN GROUP BEING INDEXED	PREFERRED METHOD
• those residing in the 48 contiguous United States	Descriptor: American Indians Identifier: Tribe Name; State (if appropriate)
• those residing in Alaska	Descriptor: American Indians; Alaska Natives Identifier: Tribe Name
• those residing in Canada	Descriptor: American Indians; Canada Natives Identifier: Tribe Name; Province (if appropriate)
• those residing in Western Hemisphere, south of the Rio Grande	Descriptor: American Indians Identifier: Tribe Name; Country (if appropriate)

e. Miscellaneous

Persons residing in the United States who are commonly referred to in the literature as "Americans" should be indexed by the Identifier:

Americans (United States)

7. Groups (Occupations) (Category 09)

This category contains the specific or collective names of occupations. All group names are formed and pluralized in accordance with the current *Dictionary of Occupational Titles* (U.S. Department of Labor). This ensures that occupational titles used by ERIC are in sex-neutral formats.

Examples are:

Contract Officers
Conveyor Operators
Editors
English Teachers
Foundry Occupations
Line Repairers
Procurement Personnel

Because ERIC is an education-related data base and not one emphasizing labor or business, occupational group names should not be created with excessive specificity. In addition, since the ERIC *Thesaurus* already contains many occupational groups, it should always be consulted before new Identifiers are created. The following consolidations illustrate both guidelines:

PREFERRED TERM	NON-PREFERRED IDENTIFIER(S)
Textile Occupations (Identifier)	Folders (Garment) Knitting Machine Operators Yarn Winders
Nurse Practitioners (Identifier)	Visiting Nurses School Nurse Practitioners
Laundry Drycleaning Occupations (Descriptor)	Hand Pressers Shirt Pressers Laundrymen Laundry Bundlers

Each occupation has a corresponding activity. Often the only difference between the two is the ending, with the occupation ending in "-ers" or "-ors" and the activity ending in "-ing." There is no general rule for preferring one word form over the other and the literature itself generally dictates which form is first used for indexing. However, both forms are usually not needed in the same vocabulary and if one already exists the other should not be created. For example, given a document on the training of woodworkers, use the existing Descriptor "Woodworking." Do not establish a new "Woodworkers" population term. Cover the population with the existing Descriptors "Semiskilled Workers" or "Skilled Workers," as appropriate.

NOTE: Occupation/Activity overlaps currently exist between some Identifiers and/or Descriptors. These are reviewed as detected and generally the Identifier is discontinued in favor of one or more Descriptors (to which postings are transferred). A current example of this type is the Identifier "Carpentry" and the Descriptors "Carpenters" and "Woodworking."

8. Groups (Other) (Category 10)

This category gathers together population groups which share one or more characteristics, excluding ethnic or occupational characteristics.

Examples are:

Consumers
English Majors
Nondegree Students
Tenants

All term forms are plural.

Population groups whose unifying characteristic is a philosophy or religion should not be created as a group name but should be indexed under the name of the philosophy or religion, e.g.:

PREFERRED	NON-PREFERRED
Atheism	Atheists
Nazism	Nazis

9. Health-Related (Including Psychology) (Category 11)

This category contains the names of diseases, sicknesses, and disorders. In addition, it contains terms related to medicine, physiology, nutrition, and drugs. Psychology and mental health are included. However, health-related equipment is assigned to Category 4——Equipment.

Examples are:

Approach Avoidance Conflict
Aspirin
Chromosomes
Dependency (Personality)
Electromyography
Hemoglobin
Noonan Syndrome

Many medical concepts have both an English and a Latin name. Selection of the appropriate name in these instances should depend on usage by the medical profession. A primary reference for determining this usage is the National Library of Medicine's *Medical Subject Headings——Annotated* (MeSH). MeSH should also be considered the authority for resolving any spelling variances.

Psychological terms are heavily represented in this category. The primary reference that should be consulted to determine usage, format, and spelling is the American Psychological Association's *Thesaurus of Psychological Index Terms*. Terms in the field of psychology are prone to being homographs and as a result must often be qualified in order to distinguish them properly.

Examples are:

Crystallization (Psychology)
Dependency (Personality)
Retroaction (Psychology)
Specimen Records (Behavior)
Stress (Biology)
Stress (Psychology)

Parenthetical qualifiers/modifiers should be in the same format as in the ERIC *Thesaurus*.

NOTE: Some older qualifier/modifier formats still exist in the Identifier file and are gradually being converted.

Many of the Identifiers in this category eventually become Descriptors. For this reason, indexers contemplating the establishment of a new health-related Identifier should always take particular care to check the ERIC *Thesaurus* first. The Descriptor Group "Physical and Mental Conditions" is one good means of conducting such a review.

10. Historical/Special Events (Category 12)

This category contains the names of special days, movements, historical periods, and periodic events usually having a state, national, cultural, or historical significance. Examples are:

Jacksonian Era
Korean War
National Library Week
Nineteenth Century

Names of events that could be homographs should have geographic location, date, or other qualifier added, e.g.:

Cultural Revolution (China)
Depression (Economic 1929)

Class trips, special days honoring local individuals, and events that have very limited usefulness in themselves as index terms should not be established but should be represented by more generic Identifiers or Descriptors, e.g.:

NON-PREFERRED	PREFERRED	
	DESCRIPTOR	IDENTIFIER
Yellow Ribbon Day	Class Activities	Iranian Hostages
Harvard 1980 Reunion	Alumni	Class Reunions Harvard University MA

11. Languages/Linguistics (Category 13)

This category contains the proper names of languages, as well as all other language/linguistic-related concepts, grammatical, syntactical, and speech-related terminology.

Examples are:

Bahnar
Balto Finnic Languages
Bangkok Dialect
Bitransitive Clauses
Commas
Connectives (Grammar)

The ERIC *Thesaurus* contains many languages and should always be consulted before adding any language names to the Identifier field. Subdivisions and dialects of languages are generally not in the *Thesaurus* and should be entered as Identifiers. In order to keep all terms concerning a given language together, the Identifier is created with the main language first followed by the subdivision, dialect, or other qualifier, e.g.:

English (British)
English (Canadian)
Turkish (Ottoman)

Ethnic groups and their corresponding language are often spelled the same in common usage. The guidelines in Category 8——Groups (Ethnic) describe methods to distinguish group from language, e.g.:

CONCEPT	PREFERRED	
	DESCRIPTOR	IDENTIFIER
People of Greece	Greek	Greeks
Language of Greece		
Tlingit (Eskimo language)		Tlingit
Tlingit (Eskimo tribe)		Tlingit (Tribe)

NOTE: The language of the document itself should not be indexed in the Identifier field. A special field (LANG) exists for specifying the language of the document.

12. Laws/Legislation (Category 14)

This category contains laws, enacted and proposed legislation, court cases, and legal concepts that are the subject of a document. Examples of typical terms in this category are:

Bakke v Regents of University of California
Civil Rights Act 1964 Title IV
Civil Rights Act 1964 Title VI
Comprehensive Employment and Training Act
Eminent Domain
H R 77 (94th Cong 1st Sess)
Lau v Nichols
Library Act 1972 (Great Britain)
Teacher Tenure Act (Michigan)

Legislation that establishes a program under which a given document is funded should not be confused with the document's subject.

Identifiers in the "Laws/Legislation" category exhibit more variations in the literature in which they occur than those in any other category. While standard citations exist in the formal legislative literature, it is common for authors to refer to legislation simply by "Title" number, assuming that the reader will know by the context the specific act that is being referenced. At the same time, the nature of the material is such that it is often of great interest to the education community, and large numbers of postings may be generated for a single law or court case. It is, therefore, incumbent on indexers to exercise special care in creating new Identifiers for this category.

a. "Short Titles" and Popular Names

Legislation should generally be entered by official "short titles," frequently assigned as convenient labels at the time the legislation (especially Federal) is formally enacted. Example:

PREFERRED "SHORT TITLE"	NON-PREFERRED FORMAL DESIGNATOR
Higher Education Act 1965	Public Law 89 329

Sometimes, however, "short titles" are less known and less frequently used than other "popular" names. Example:

PREFERRED POPULAR NAME	NON-PREFERRED "SHORT TITLE" (AND) FORMAL DESIGNATOR
Fulbright Hays Act	Mutual Educational and Cultural Exchange Act 1961 Public Law 87 256

Although much legislation is identified by the word "Act," another frequent designator is the word "Program." Examples:

Guaranteed Student Loan Program
National Defense Student Loan Program

While technically they are legislative acts, such "programs" fall within Identifier Category 19——Projects/Programs.

Because of the multiplicity of alternative name forms in this category and the difficulties inherent in the task of choosing the "most popular" name, appropriate USE/UF cross-references in the IAL become essential in leading indexers to the preferred terms.

b. "Title" Numbers

Federal legislation is typically subdivided into "Titles" (identified always by Roman numerals). Title numbers may be appended to the end of broad names of legislation to create narrower and more distinctive Identifiers. Example:

Social Security Act Title XX

A broad name without subdivision, such as "Social Security Act," should be used only when the document truly deals with the entire body of legislation represented by the name of the act.

The Title number alone should never be used as an Identifier, as it has meaning only in relation to a particular act. There are rare circumstances, however, in which a piece of legislation becomes commonly known only by its Title number and never acquires a popular name. An example is Title IX of the Education Amendments of 1972, which deals with sex discrimination. In such a situation, it is permissible to use the Title number preceding the legislation of which it is a part, e.g.:

Title IX Education Amendments 1972

This form, however, should be avoided as much as possible.

Like broad legislative name forms, sometimes individual legislative "Titles" also become better known and more widely cited by other names. In these cases, the more "popular" name forms are chosen as preferred Identifiers. Examples:

PREFERRED POPULAR NAME	NON-PREFERRED "TITLE" NAMES
Emergency School Aid Act 1978	Education Amendments 1978 Title VI
Ethnic Heritage Studies Program	Elementary Secondary Education Act Title IX E

c. Year

Whenever possible, if the 50-character limit permits, the year that the legislation was enacted should be appended as an integral part of the Identifier. In some cases, citing the year can be imperative in order to distinguish separate laws bearing the same basic name, e.g.:

Civil Rights Act 1871
Civil Rights Act 1957
Civil Rights Act 1964

These citations normally would contain the word "of," as in "Civil Rights Act of 1964." In all such cases, "of" is removed as part of the preferred Identifier.

d. Public Law Numbers

Public Law numbers, e.g., "Public Law 92 318," should always be avoided as Identifiers unless there are no alternative "short titles" or popular names to use.

e. Proposed Federal Legislation

Proposed Federal legislation is entered in the IAL only in the form of a House or Senate Bill number. A House Bill is preceded by "H R"; a Senate Bill by "S." Since Congressional Bill numbers begin again with each new Congress (i.e., every two years), it is essential to follow the Bill number by the number and session of the Congress in order to identify it uniquely, e.g.:

S 6 (93d Cong 1st Sess)

Because of the relatively brief "life spans" of such concepts, they are usually avoided as Identifiers. They are justified

as Identifiers only if they have considerable significance for the field of education and promise to have more than one posting in the ERIC data base.

f. State and Foreign Legislation

State legislation (or the legislation of a Canadian province) should be entered under its name followed by the name of the state (or province) in parentheses, e.g.:

Public Employment Relations Act (Michigan)

State legislation may be subdivided into titles, chapters, etc. As with Federal legislation, the most commonly used form is chosen as the preferred Identifier, with cross-references from non-preferred forms added to the IAL as needed.

Legislation of countries other than the United States should be entered in the same manner, e.g.:

Education Act 1968 (Kenya)
Endowed Schools Act 1869 (England)

In a few instances, the name of the state, province, or country precedes the legislative citation in the IAL. This occurs when the legislation's name could not be specifically verified or when the citation is a collection of codes for the area.

g. Court Cases

Court cases should be entered with the plaintiff and defendant cited in the same manner as in the original legal brief and not augmented. Example:

PREFERRED FORM	NON-PREFERRED FORMS
Brown v Board of Education	Brown v Topeka Board of Education Brown v Board of Education of Topeka

NOTE: "v" (not "vs") is always used as the abbreviation of "versus."

Court case names may vary in the way they are cited in the popular literature (even to the point that the plaintiff and defendant can get reversed!). However, for indexing

purposes, the original case name should continue to be used as the preferred Identifier as long as the case itself is an indexable concept in the literature.

Court decisions that may have an impact on educational practices or programs (as the Lau decision on bilingual education programs) should be indexed under the original court case name and not colloquially. Example:

PREFERRED FORM	NON-PREFERRED COLLOQUIALISM
Lau v Nichols	Lau Decision

h. Truncation

Names of legislation may easily exceed the 50-character Identifier limitation, particularly when Title numbers, years, state names, etc. are added to the basic citation. Indexers should follow the truncation rules set forth in the general guidelines of this section. Truncation should be standardized for a specific act in such a way that all subdivisions of that act will file alphabetically in sequence. Example:

PREFERRED FORMS	NON-PREFERRED FORM
Elementary Secondary Education Act Elementary Secondary Education Act Title I	Elementary and Secondary Education Act 1965

i. Authorities

Two principal authorities helpful in verifying and standardizing legislation names are the following:

- *A Compilation of Federal Education Laws as Amended Through June 30, 1977* (House Committee on Education and Labor and Senate Committee on Human Resources, June 1977)
- *Catalog of Federal Domestic Assistance* (revised annually by the Office of Management and Budget)

13. Methods/Theories (Category 15)

This category contains the names of a wide variety of methods, techniques, procedures, theories, standards, and models, both general and specific. Examples are:

Monte Carlo Methods	Planning Programming Budgeting System
Montessori Method	Rasch Model
Piagetian Theory	Rehearsal Strategies

Caution should be exercised in creating Identifiers in this category when the name of the method, theory, etc., begins with the name of the author of the document being indexed. Unless the author is very well known, it may be better to index by the subject matter of the method. The indexer could then choose to also index the name of the author, or to not index the name and to let the searcher coordinate the Descriptors/Identifiers with the Author field. Example:

CONCEPT	POSSIBLE INDEXING
Smith's Theory of Educational Counseling	DESC: Educational Counseling; Counseling Theories IDEN: Smith (Jill A) OR Use above Descriptors alone, and let searcher check the Author Field

Should the method/theory or its author eventually become well enough known to be cited by others, then the name of the concept as cited can be considered for a possible new Identifier.

Coined terminology often is assigned to the Methods/Theories category. Coined names frequently appear in documents on research projects, and their use as Identifiers is discouraged except in situations where the author/researcher is well known. Conservatism in establishing such terminology will prevent a profusion of once-posted terms.

There is a conceptual overlap between the Methods/Theories category and both the Curriculum Areas and Projects/Programs categories.

14. Miscellaneous (Category 16)

This category contains a potpourri of terminology not appropriate to the other categories and not in sufficient numbers or "clumps" to form additional defined categories. The terms in this category come from such areas as athletics, philosophy, business, and literature. Many terms in this category later become Descriptors, if warranted by usage. Examples:

Audits	Gatekeeper Role
Bowling	Maternity Benefits
Buddhism	Newbery Award
Chicano Literature	Noncontact Sports
Gallup Poll	Teacher Surplus
Gardening	White Flight

15. Organizations/Institutions (Category 17)

This category contains the names of specific organizations of all types: government agencies, legislative bodies, foundations, school districts, professional societies, and community, educational, and industrial institutions. All names are entered as completely as space permits. Examples are:

4 H Clubs
Advisory Council on College Chemistry
American Association for Advancement Science
American Telephone and Telegraph Company
Army
Bureau of Indian Affairs
California State Department of Education
City Colleges of Chicago IL Malcolm X College
Congress 96th
Department of Health Education and Welfare
Department of Education
ERIC
ERIC Clearinghouse on Urban Education
Kellogg Foundation
Mid Continent Regional Educational Laboratory MO
National Institute of Education
New York City Board of Education
Open University (Great Britain)
Social Science Education Consortium
Station WQED TV PA
Station KPFT Radio TX
Supreme Court
UNESCO
University of California Los Angeles

The creation and use of organizational names as Identifiers is governed by the following general rules:

- If an organization is the subject of a document, it is permissible to enter the organization's name as an Identifier. Examples of types of documents in which this would be true are:

  Document A: Policies of the Miami School Board

  Document B: Listings of projects funded by the National Institute of Education

- If an organization is the preparer, source, sponsor, or funding agent, but not the subject of the document, then it is not permissible to enter the organization's name as an Identifier. The Institution and Sponsoring Agency fields exist to capture the names of organizations having these other relationships.

- If an organization is involved both as the subject and the source of the document, then use of both the Identifier and Institution (or Sponsoring Agency) fields is permissible. An example is the document *The National Institute of Education—Its First Five Years*, written about NIE and funded or published by NIE.

a. Geographic Designators

Different organizations in different locations may have the same basic name. For example, there are over ten "Jefferson County School Districts," over four "Union Colleges," etc. If these names were entered without geographic designation, they could not be distinguished from each other and retrieval would suffer. For this reason, all United States and Canadian organizations requiring a geographic designator must have the state or province postal code appended, except for national Canadian organizations which would have the modifier "Canada" appended (in parentheses). Organizations of other countries requiring a geographic designator must have the country name appended (in parentheses). Organization Identifiers with no specific geographic referents are assumed to refer to U.S. organizations.

Certain kinds of organizations, however, do not require geographic designations. The sections that follow distinguish those that do not require location information and those that do.

(1) Organizations NOT Requiring Geographic Designator

Any organization that has the name of a state or country as part of its name need not have that information repeated as part of the Identifier. Large commercial

firms or not-for-profit organizations having multiple outlets or locations, agencies of the U.S. Government, and national U.S. professional associations also do not require a geographic designator. Examples:

American Association of Retired Persons
Coast Guard
Congress 96th
Department of Education
Digital Equipment Corporation
Dow Chemical Company
Eastern Arizona College
Episcopal Church
Florida State Library
Ford Foundation
National Council of Teachers of English
*New York City Board of Education
*Oklahoma City University
Senate Subcommittee on Education
University of Maryland College Park

*NOTE: Organizations with city names that include the name of the state in which they're located, also need not carry a further geographic designator.

(2) Organizations Requiring Geographic Designator

In each of the following examples, a geographic designator is added either in order to differentiate the name from others like it or because the location adds an important dimension to the name that could bear on retrieval.

CAMPS:	Camp Cuyamaca CA
CENTERS:	Center for Philosophic Exchange NY East West Center HI
DAY CARE CENTERS:	Casper Day Care Center WY
FOREIGN ORGANIZATIONS:	Alcohol Education Centre (England) Education Corps (Iran) Federal Parliament (Yugoslavia)
HOSPITALS:	Boston Childrens Hospital MA
LIBRARIES:	Butte County Public Library CA East Saint Louis Public Library IL
MILITARY FACILITIES:	Davis Monthan Air Force Base AZ

...Continued

MUSEUMS:	Baltimore Museum of Art MD
NEWSPAPERS:	Chicago Daily News IL Dayton Journal Herald OH
RADIO AND TV STATIONS:	Dover Educational Television Ctr (Great Britain) Station WNYC NY Station WTTW IL
RESERVATIONS:	Canoncito Navajo Reservation NM Flathead Indian Reservation MT
SCHOOL DISTRICTS:	Abernathy Independent School District TX Clark County School District NV
SCHOOLS/ COLLEGES:	Abraham Baldwin Agricultural College GA Academy of Pedagogical Sciences (USSR) American University DC Brock University ON Decroby School of Barcelona (Spain) Dublin College of Speech Therapy (Ireland) Flynn Model Elementary School RI Forty Fry High School OH University of Edinburgh (Scotland)
ZOOS:	Bronx Zoo NY

The official postal codes for the United States and Canada are displayed in Figure VIII-2-10.

SPECIAL NOTE ON CANADA:

Canadian organizations were originally treated just as those from other foreign countries, with the modifier "Canada" added in parentheses. However, all new Identifiers should now use the appropriate Canadian postal codes shown in Figure VIII-2-10. Of course, national Canadian organizations still require the parenthetical qualifier "Canada," to distinguish them from national U.S. organizations.

b. Associations and Societies

Educational, social, professional, cultural, or community associations and societies should be entered as completely and accurately as possible within the 50-character limitation. Indexers should follow the truncation rules set forth in the general guidelines of this section.

No association Identifier should be created without verifying wording, existence, and spelling. One useful verification source is the *Encyclopedia of Associations*. A document may refer to the American Association of Schools

Alabama	AL	Oklahoma	OK
Alaska	AK	Oregon	OR
Arizona	AZ	Pennsylvania	PA
Arkansas	AR	Rhode Island	RI
California	CA	South Carolina	SC
Colorado	CO	South Dakota	SD
Connecticut	CT	Tennessee	TN
Delaware	DE	Texas	TX
Florida	FL	Utah	UT
Georgia	GA	Vermont	VT
Hawaii	HI	Virginia	VA
Idaho	ID	Washington	WA
Illinois	IL	West Virginia	WV
Indiana	IN	Wisconsin	WI
Iowa	IA	Wyoming	WY
Kansas	KS	Canal Zone	CZ
Kentucky	KY	District of Columbia	DC
Louisiana	LA	Guam	GU
Maine	ME	Puerto Rico	PR
Maryland	MD	Virgin Islands	VI
Massachusetts	MA		
Michigan	MI	CANADA	
Minnesota	MN		
Mississippi	MS	Alberta	AB
Missouri	MO	British Columbia	BC
Montana	MT	Manitoba	MB
Nebraska	NE	New Brunswick	NB
Nevada	NV	Newfoundland	NF
New Hampshire	NH	Northwest Territories	NT
New Jersey	NJ	Nova Scotia	NS
New Mexico	NM	Ontario	ON
New York	NY	Prince Edward Island	PE
North Carolina	NC	Quebec	PQ
North Dakota	ND	Saskatchewan	SK
Ohio	OH	Yukon Territory	YT
		Labrador	LB

FIGURE VIII-2-10: OFFICIAL POSTAL CODES OF THE UNITED STATES AND CANADA

of Dentistry, the American Association for Dental Schools, or the Association of American Dental Schools when, in fact, the correct organization name is the American Association of Dental Schools. Indexers have the responsibility of verifying all association names before posting them as Identifiers.

All rules for geographic designators, including the use of U.S. and Canadian postal codes, apply to the creation of association Identifiers. Examples:

Audio Visual Education Association of California

Future Farmers of America
NOTE: National Association

Future Farmers of America IL
NOTE: Illinois State Chapter

Southeast Council for Exceptional Children IL
NOTE: Requires postal code; "southeast," although a geographic referent, is ambiguous by itself.

c. Government Agencies

United States Federal government agencies are entered without the words "United States" preceding the Department, Agency, Bureau, Branch, Office, etc. Examples are:

Congress 96th
Department of Education
House of Representatives
National Institute of Education
Navy

State (or provincial) government agencies are entered with the appropriate state (or province) name preceding the agency, e.g.:

Maryland State Department of Education
Ontario Department of Health

All other government agencies——local, municipal, county, foreign, etc.——must have some geographic designator, either within the name itself or as an appended modifier.

In the case of government agencies it is especially important to observe the general rules and guidelines concerning organizations as subjects. A document containing enrollment statistics for Pennsylvania public schools should be indexed by the Descriptor "Public Schools" and the geographic Identifier "Pennsylvania." It should not be indexed by an organization Identifier representing the issuing agency.

The *United States Government Manual* is the principal authority to be used for Federal agency names. *Patterson's American Education* should be used for State education agencies.

d. Institutions of Higher Education

The names of institutions of higher education (i.e., universities, colleges, junior colleges) should be entered in natural word order and not inverted (as in COSATI corporate author cataloging, and the ERIC *Source Directory*). Example:

PREFERRED FORM	NON-PREFERRED FORM
University of Wisconsin	Wisconsin University

Institutions with several campuses or levels should be subdivided, as appropriate. For example, the State University of New York (SUNY) system has many separately administered subdivisions, and Identifiers for some of these follow:

State University of New York
(Note: Use when entire system is subject.)

State University of New York Buffalo

State University of New York Coll at Cortland

State University of NY Agric Tech Coll Alfred

Other major university systems with many subdivisions are:

City Colleges of Chicago
City University of New York
University of Hawaii

Academic libraries are normally indexed by the parent institution and not entered separately.

The *Education Directory—Colleges and Universities*, produced annually by the National Center for Education Statistics (NCES) is to be used as the authority for the names of higher education institutions. Other directories frequently employ variable formats for purposes of arrangement, indexing, etc., and, because of this, should not be used for purposes of Identifier verification. The NCES directory specifically reports name changes, mergers, etc.

The *World of Learning* should be used as the authority for the names of higher education institutions outside of the United States.

All higher education institution names should be verified using the above authorities. Occasionally, in the past, indexers have entered fictitious institution names as Identifiers, not realizing that such names were "invented" by authors for the purpose of theoretical studies.

e. K-12 Educational Institutions

School district names are usually the lowest subdivisions necessary for retrieval of K-12 institutions. Identifiers for specific elementary schools and high schools should generally be avoided in favor of the name for the overall school district. Various name forms exist for local public school systems, and these differ widely from state to state. Also, local systems are frequently inconsistent in how they refer to themselves. *Patterson's American Education* should be used in an effort to determine an "official" name.

Usually one Identifier is sufficient to represent the subject of a particular local school system. The admitted distinctions among the board of education, unified school district, public school system, etc., for one locality are generally not sufficient to justify creating separate Identifiers for each entity. Example:

PREFERRED FORM	NON-PREFERRED FORMS
Philadelphia School District PA	Philadelphia City Schools Philadelphia Public Schools Philadelphia Public School System Philadelphia Board of Education

Documents dealing with various subjects pertaining to a given public school system (e.g., students, policies, etc.) should not be indexed by the geographic Identifier unless they also deal with the community at large. Examples:

Topic:	Integration policies of Boston Public School District
Use:	Boston Public Schools MA
Do Not Use:	Massachusetts (Boston)

Topic:	Housing patterns and school integration policies in Boston
Use:	Boston Public Schools MA and Massachusetts (Boston)

16. Personal Names (Category 18)

This category contains the names of actual (not fictional) individuals used as the subjects of documents. Fictional characters, for which there are few Identifiers, are assigned to Category 16——Miscellaneous. Methods and theories named after a person are assigned to Category 15——Methods/Theories. Examples:

Adams (Abigail)
Agathe (Saint)
Alcott (Louisa May)
Baum (L Frank)
Bloom (Benjamin S)
Byron (Lord George Gordon)
Catherine of Siena (Saint)
Champlain (Samuel de)
Chaplin (Charlie)
Chomsky (Noam)
Clarendon (Edward Hyde 1st Earl of)
Cummings (E E)
De Gaulle (Charles A)
Drake (Sir Francis)
Edward VII
Euclid
Goethe (Johann Wolfgang von)
King (Martin Luther Jr)
Loyola (San Ignacio de)
Mao Tse Tung
Newman (Cardinal John Henry)
O Neill (Eugene)
Piaget (Jean)
Plutarch
Shakespeare (William)
Skinner (B F)

The individual's surname is entered first, with the given name, etc. normally following in parentheses. When surname and first name are the same (e.g., Chinese names), no parentheses are used. As with all Identifiers, no special characters other than parentheses should be used; initials should be separated by a space.

Use the name by which an individual is commonly identified (whether a real name, assumed name, nickname, title of nobility, or other appellation). Standard references such as the *Encyclopedia Americana* should be used to determine appropriate name forms. Examples where common usage varies from official name are as follows.

PREFERRED	NON-PREFERRED
Carter (Jimmy)	Carter (James Earl)
Eliot (T S)	Eliot (Thomas Stearns)
Moliere	Poquelin (Jean Baptiste)
Twain (Mark)	Clemens (Samuel Langhorne)

Do not enter two individuals having the same last name as one Identifier, no matter how closely associated the two may be, e.g.:

Smith (John)
Smith (Jill) not Smith (John and Jill)

Computer systems, software, and equipment are commonly named after individuals, particularly after famous persons such as the Greek philosophers. It is necessary in these situations to qualify one or more of such terms in order to differentiate them and avoid the creation of homographs, e.g.:

PLATO Plato of Athens	Computer system Greek philosopher
ARISTOTLE (Computer Program) Aristotle	Computer system Greek philosopher

17. Projects/Programs (Category 19)

This category contains the names of specific projects, programs, studies, and surveys. Examples:

Chemical Education Materials Study
Community Coordinated Child Care Program
Linguistic Bibliography Project
Mobilization for Youth
National Assessment of Educational Progress
Operation SEEK
Project Search
Project Search for Preventive Approaches
Project SPACE
Right to Read
Upward Bound

a. Acronyms

The general guideline is to avoid acronyms as Identifiers wherever possible. However, in those cases where projects are most commonly known by their acronyms, e.g., Project SPACE, such names maybe used. The IAL cross-reference capability can be used to lead from spelled-out version to acronymic version (and vice versa), if appropriate. Whenever a project has both a spelled-out name and an acronym name, both should appear in the Abstract regardless of which one is selected as the Identifier.

b. Homographs

Project/program names provide many opportunities for homographs. Capitalization and spacing are sometimes the only clues that a project/program listed in the IAL may not be the same as the one dealt with in the document being indexed. Examples:

Project Out Reach
Project Outreach
Project OUTREACH

If a project/program mentioned in a given document is different in spacing or case from a project/program name in the IAL, it is dangerous to simply assume that they are the same. The indexer should either verify the identity of the name in the IAL by examining the earlier accessions (postings), or should create a new Identifier that matches the new format found in the document but, also, that differs from the earlier Identifier by something other than spacing or case.

When comparing terms to see whether they are duplicated, the ERIC computer system first compresses the term by removing blanks and special characters and then converts all characters to upper case. For this reason, terms cannot be differentiated solely on the basis of spacing or case. In order to differentiate homographs, it is necessary to add characters. Two acceptable methods are:

(1) Adding a subject qualifier, e.g., "Project EUREKA (Electrician Training)"

(2) Adding a geographic/postal designator, e.g., "Project EUREKA MN"

c. Overlap with Curriculum Category

Project/program names frequently overlap with Identifiers in Category 3——Curriculum Areas. Indexers should take care to avoid duplication between these two categories.

18. Science and Technology (Category 20)

This category contains terms pertaining to the physical and earth sciences. It excludes the health/medical sciences (Category 11) and general curriculum areas covering the physical/earth sciences (Category 3). It includes mathematical concepts and technological applications of scientific knowledge. Examples:

Aquaculture	Earthquakes
Algae	Factoring (Mathematics)
Biofuels	Geometric Constructions
Biological Control	Quasars
Black Holes	Radioactivity
Cinefluorography	Reptiles
Coal Gasification	Toxic Substances
Constellations	Triangles
Copper Chromate	Venn Diagrams
Diamonds	Wind Erosion
Dry Ice	Zero Population Growth

ERIC is not primarily a science and technology data base and, therefore, in creating new Identifiers for this category, excessive specificity should be avoided, e.g.:

PREFERRED	NON-PREFERRED
Monkeys	Rhesus Monkeys Squirrel Monkeys

Terms in this category should be formatted similarly to Descriptors in the "Science and Technology" Descriptor Group. The principal lexicographic authority for use with this category of Identifiers is the *Thesaurus of Engineering and Scientific Terms* (TEST).

19. Tests/Testing (Category 21)

This category contains the names of specific tests, general test batteries, statistical terms related to testing, and various concepts related to inventories, searches, samples, surveys, measurement, and evaluation. Examples:

ACT Assessment
Bender Gestalt Test
College and University Environmental Scales
Edwards Personal Preference Schedule
General Aptitude Test Battery
Iowa Tests of Basic Skills
Minnesota Multiphasic Personality Inventory
Raven Progressive Matrices
School and College Ability Tests
Stanford Achievement Tests
Watson Glase Critical Thinking Appraisal

The authority to be used for the names of most published tests is Buros' *Mental Measurements Yearbook*. Tests which cannot be verified in this authority (usually unpublished or research instruments not widely disseminated) should be entered as formally cited in the document being indexed. Tests whose names cannot be established satisfactorily by either of these approaches should be checked with staff of the ERIC Clearinghouse on Tests, Measurement, and Evaluation.

Test names are generally established as Identifiers according to one of two patterns:

(1) the test name starts with the name of its designer or creator; or

(2) the test name must be modified by the name of its designer or creator in order to be clearly differentiated from other similarly named tests.

Examples are:

TEST NAMES BEGINNING WITH NAME OF DESIGNER/CREATOR	TEST NAMES QUALIFIED WITH NAME OF DESIGNER/CREATOR
Gates MacGinitie Reading Tests	Adjective Check List (Gough and Heilbrun)
Harvard Project Physics Achievement Test	Behavior Prediction Test (Morrison)

Test names should not be indexed if they are incidental to the research being reported. For example, a report in which the Gates MacGinitie Reading Tests were used to simply group subjects for some purpose should not necessarily be indexed by that test name unless the scores had some bearing on the research results.

Teacher-developed classroom tests, e.g., a series of questions on *Hamlet*, are not normally considered as appropriate Identifiers because they are unlikely to be dealt with by other documents.

20. Titles (Literature and the Arts) (Category 22)

This category contains book titles, report titles, the names of journals, monographic series, plays, poems, television shows, etc. Examples:

1984 (Title)
Abe Lincoln in Illinois
Catcher in the Rye
Future Shock
Graduate (The)
Hamlet
Handbook of Cooperative Education
Homecoming (Pinter)
Huckleberry Finn
Jesus Christ Superstar
Journal of Chemical Education
Miami Linguistic Readers
New York Times
Resources in Education
Roots (Haley)
Young Abe Lincoln

Reports or studies sometimes become best known by the name of the chairperson or chief investigator. If a report becomes regularly cited in this way, and not by its formal or official name, the preferred Identifier should be the name in common usage, e.g.:

PREFERRED	OFFICIAL NAME
Coleman Report	Equality of Educational Opportunity Report

An IAL cross-reference from the official name to the commonly cited name is appropriate in such instances.

Titles that are potential homographs should have a qualifier added as appropriate, e.g.:

1984 (Title)
Carrascolendas (Television Series)
Dead Birds (Title)
Science (Journal)

Common titles that have been used by more than one author should be differentiated by adding the author's name as a qualifier, e.g.:

Homecoming (Hamner)
Homecoming (Pinter)
Homecoming (Sanchez)
Homecoming (Snow)

Books in Print and the *Cumulative Book Index* can be used as authorities to verify the titles of commercially available books.

D. ERIC Facility Identifier Processing Procedures

All incoming Identifiers to RIE and CIJE are validated by computer against the *Identifier Authority List* (IAL). Those not found in the IAL are reviewed by the lexicographic staff for proper format. New Identifiers are cumulated and the IAL updated on a monthly basis. Based on the lexicographic review, the Facility editors make the necessary changes to the RIE input, and recommendations for CIJE Identifiers are routed to the CIJE Contractor for similar implementation.

Concurrently with each *Thesaurus* update, the terms in the IAL which have been made Descriptors or UF's are removed from the IAL. In addition, as part of routine maintenance, and as a result of recommendations received from the Clearinghouses and users, Identifiers may be deleted from the IAL, merged with other Identifiers, or modified in form.

(NOTE: Although the establishment of the IAL obviates the need for the Clearinghouses to keep inhouse lists of all Identifiers used, a current list of Identifiers that are potential Descriptors should be maintained and the necessary Vocabulary Development Forms (Form EFF-73) generated when the postings indicate such action. (See Section 8, Part 1.)